

A top-down view of a desk with a clipboard, coffee, keyboard, mouse, flowers, and stationery. The clipboard is the central focus, holding a pink sheet of paper with the title 'Weekly Checklist: HOW TO KEEP YOUR SANITY AND STILL GET STUFF DONE!'. Surrounding the clipboard are various items: a cup of coffee, a keyboard, a mouse, pink flowers, gold stars, paper clips, a ruler, a pen, and a lipstick.

Weekly Checklist:

HOW TO KEEP YOUR
SANITY AND STILL GET
STUFF DONE!

Spending time 'thinking like a CEO' is an important way to stay focused on what success looks like for you and your business. As the CEO of your business, it's your responsibility to set the big picture vision for your business as well as the goals.

Setting time aside each week is really a quick check-in with your business to ensure that you are on track to achieve your goals. This is your time to wear your CEO hat.

Here's a quick checklist to help you stay focussed on those CEO level tasks:

01

Review Your Metrics.

When we think of our numbers, the biggest one to track is obviously REVENUE. But revenue is a LAGGING METRIC. It's the LAST METRIC we can track after a series of other actions have taken place. If you are only tracking your revenue, you miss opportunities to improve your marketing and sales system... which in turn means you are leaving money on the table.

We also want to track your LEADING METRICS. These are the numbers that will help you determine if you are on track or off track. Your leading metrics will vary based on your particular business but generally they will be related to new lead generation.

Are you tracking your number of sales conversations per week or your conversion rate of those conversations? Are you tracking how many new email addresses you've added to your email list or how many new leads you got this week?

Set a weekly reminder to track your LEADING + LAGGING metrics!

Track Your Monthly Revenue (lagging metric) Goals. Using a tracking spreadsheet, are you on track or off track with your revenue and new client goals?

Track Your Monthly Engage (leading metric) Goals. Using a tracking spreadsheet, are you on track or off track with your engage goals?

02

Set Your Weekly Top 3 Priorities.

What are the top 3 priorities this week for your business? I write these in a planner page and block time in my calendar.

- ✓ How are you **CAPTURING** new potential clients? Do you need to pitch yourself for a guest post or as a guest on a podcast or as a speaker at a summit? Make time to take action!
- ✓ How are you **CULTIVATING** new potential clients? Do you need to write a newsletter or post on social media? Make time to take action!
- ✓ How are you **CONVERTING** new prospects into clients? Are you offering a free strategy or sales call? Make time in your calendar!
- ✓ How are you **FOLLOWING UP** with potential and past clients? Do you need to schedule another call with them; send them some valuable content?
- ✓ How are you **DELIGHTING** existing clients? Are you sending thank you notes or hosting a bonus call? Make time in your calendar!

03

Manage Your Weekly Calendar.

If it matters - make TIME for it! I use my google calendar and scheduler to help me block time for recurring tasks or things that require more time.

Other things to schedule:

- office hours
- family commitments, self-care, vacation
- content creation time
- networking events
- anything else you do regularly

04

Schedule Team Meetings.

Communication is KEY to a team that works well together.

Each week, check in with your key team members to make sure everyone is on the same page and answer any questions or concerns. This meeting will dramatically cut down on meetings, emails, and calls during the week.

05

Review Your Goals.

To ensure that your plan stays nimble and dynamic, it's important to check in weekly.

Are you on track?

What adjustments need to happen?

What's new to be added?

What needs to be let go?



Diana Lidstone

Biz GROW Master

After almost four decades in business and working globally with coaches, consultants, & private practitioners, Diana Lidstone has gathered rock-solid wisdom that has helped thousands of entrepreneurs and professionals explode their profits while regaining free time. Her work embodies #worklessearnmore!

As the creator of the Grow-meter, the Grow Equation Calculator and as best-selling author of *Shift into Rich: Navigate the 9 Roadblocks to Small Business Success*, Diana's signature GROW Equation transforms frazzled, overworked business owners into profitable, overjoyed CEOs. Her new podcast, *The GROW Equation Business Podcast*, contains tips, strategies & interviews to help grow your profits, free time and your joy!

She is often found walking her dog and drinking champagne (not at the same time)!

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